**Key Terms and Concepts**

* **MANAGERIAL GRID AND SITUATIONAL LEADERSHIP®**  
  While the two models appear to be different, they are actually quite complimentary. If you are going to be an effective manager, Situational Leadership® assumes the manager has a high concern for both production and people. The issue that arises from the Managerial Grid® is that it draws behavior conclusions from an attitudinal model, and we cannot predict behavior from the basis point of an attitudinal model. Leader behavior, not feelings, attitudes and values impacts follower behavior and performance. Situational Leadership holds high concern for people and results while focusing on matching leadership style to the follower’s performance readiness in any given situation.
* **LIKERT’S CAUSAL, INTERVENING AND OUTPUT VARIABLES AND SKINNER’S THEORY**  
  Both of these theories can be woven into the Managerial Grid®. Likert’s intervening variables or Skinner’s Organisms are similar to the concern for the people axis on the Managerial Grid®. Likert’s end result variables and Skinner’s Response are similar to the concern for production axis on the Managerial Grid®. What we need to look at next then are the Causal variables, which is where Situational Leadership® comes into play. Situational Leadership® creates the necessary behavior by determining which leadership style is needed to match the performance readiness.
* **MCGREGOR, LIKERT, MCCLELLAND, SCHEIN AND ARGYRIS THEORIES**
  + Likert’s system 1 describes behaviors that have often been associated with Theory X assumptions; people prefer to be directed, are not interested in assuming responsibility, and want security above all. These assumptions are also consistent with Argyris’s immature end of the continuum. Likert’s system 4 illustrates behaviors associated with Theory Y; people are not lazy and unreliable by nature and thus can be self-directed and creative at work if properly motivated. These assumptions and the corresponding system 4 behavior seem to correspond to Argyris’s mature end of the continuum. System 1 is task oriented, and system 4 is based on teamwork, mutual trust, and confidence. System 2 and 3 are intermediate stages between 1 and 4.
  + Argyris contends that most often structured, controlling, A behavior patterns are associated with Theory X assumptions of human nature and that unstructured, nondirective, B behavior are patterns associated with Theory Y assumptions. The relationship between Theory X and Theory Y assumptions and A behavior and B behavior patterns is not necessarily a one-to-one relationship, you can find managers who have the predictable XA combination, but there are also some YA managers. Although both types of managers will tend to use Situational Leadership styles S1 and S2, their assumptions or attitudes are not the same. The same holds true for YB and XB managers.
  + Schein discussed four assumptions about people and their implied managerial styles: rational-economic, social, self-actualizing, and complex. While the tendency is to consider Theory X managers as emphasizing task behaviors in highly structured ways and Theory Y managers primarily using relationship behaviors. These assumptions are not necessarily accurate because these are managers’ assumptions about the nature of people and do not necessarily translate directly into leader behaviors. There are Theory X and Theory Y managers who use all four of the leadership styles.
  + The assumption underlying rational-economic people are very similar to those depicted by McGregor’s Theory X. Rational-economic people are primarily motivated by economic incentives and the managerial strategy should therefore place emphasis on task performance, which is consistent with Situational Leadership® styles S1 and S2.
  + For social people comes the assumption that human beings are basically motivated by social needs and seek social relationships on the job. Manager should not limit their attention to task behavior for these individuals, but rather engage in relationship behaviors, which would be related to Situational Leadership® styles S2 and S3.
  + Self-actualizing people are seen as seeking meaning and accomplishment in their work as their other needs become fairly well satisfied. These people tend to be more self-motivated, self-directed, and willing to integrate their goals with those of the organization. Managers should focus on enriching their jobs by making them more challenging and meaningful. Managers can use Situational Leadership® S4 style with these individuals because they need little task and relationship behavior.
* **MASLOW’S HIERARCHY OF NEEDS**  
  Maslow’s Hierarchy of Needs can be woven into the performance readiness levels and the styles to match of Situational Leadership®. A person attempting to satisfy their physiological needs, will be at performance readiness level R1; safety needs at R2; social needs at R2 or R3; esteem needs at R3 or R4; and self-actualization needs at R4.
* **HERZBERG’S THEORY OF MOTIVATION**  
  Herzberg’s Theory of Motivation can be weaved into Situational Leadership® by matching the hygiene and motivators with the appropriate leadership styles and performance readiness. People who are more influenced by Hygiene factors would match better with lower levels of performance readiness. Individuals who are more influenced by motivators will match better with R3 and R4 performance readiness level.
* **SITUATIONAL LEADERSHIP® AND POWER BASES**  
  The power base that a leader should utilize depends on the performance readiness level of an individual. A follower at performance readiness level R1 requires the use of coercive power. As a follower begins to move from performance readiness level R1 to R2 the S1 and S2 leadership styles are more effective if the leader has connection and reward power. Legitimate power can be helpful with S2 and S3 leadership styles. Referent power enhances the high supportive, but low directive S3 style required to influence moderate to high levels of performance readiness. Information and expert power can be helpful in using an S3 and S4 styles.
* **PERSONALITY THEORIES**  
  Personality theories such as the DISC or Social Styles can be woven into Situational Leadership®. We can integrate the personality types or styles with Situational Leadership®. These two models are also four quadrant models and build from two axes. First is degree of assertiveness and degrees of responsiveness and take into account the follower’s personality type when delivering or receiving information. So high in assertiveness, low in responsiveness—action oriented this would be the dominant type in DISC or Driver in Social Style. When influencing a person who’s primarily a Driver type or D style, the leader should deliver their message with conviction. For a person high assertiveness, high in responsiveness—people oriented, this would be the Expressive type in DISC or the I style in Social Styles. For an Expressive type or I style the leader should deliver their message with flair. An individual low in assertiveness and high in responsiveness—people oriented, this would be the Amiable type in DISC, or the S style in Social Styles. For an Amiable type or S style person, the leader should deliver their message with warmth. An individual low in assertiveness and low in responsiveness—action oriented this would be the Analytical type in DISC and the C style in Social Styles. For an Analytical type or C style the leader should deliver their message with data.